Change to product details

If your personal circumstances mean you need additional support, or if you'd like a large print, Braille or audio version of this document, please visit **aegon.co.uk/additionalsupport** or call 03456 0810 680 (call charges will vary).

This form can be used to make changes to any of your products. If you want to make changes to different products please complete separate forms for each.

You can't use this form to make changes to Aegon Ireland Wealth Management Portfolio (WMP). If you want to make changes to WMP please contact your adviser.

If you'd like to change your personal details please complete the Change of investor details form. Please complete this form by typing in the boxes, including the signature boxes and emailing it to **clientsupport@arc.aegon.co.uk**

Our email system and the way we deal with data is internally secure. However, we're unable to ensure the security of emails before they reach us. Please consider this when sending us sensitive information.

Important note

Important note: If your pension has been upgraded by Aegon to an Aegon Retirement Choices Self Invested Personal Pension (ARC SIPP) and you go ahead with this transaction, we'll view this as your agreement to the transfer of your former Aegon pension plan to this ARC SIPP.

This means:

- a. If waiver of contribution insurance cover is required it will have to be taken out with another provider, and will be subject to underwriting and payment of an additional premium, as this option isn't available with an ARC SIPP.
- b. We won't allow a return to your former pension plan.

You can find more information on our customer returns policy at aegon.co.uk/modernpension

By submitting this form you are confirming your agreement to the upgrade.

1. Product details

What product type and number should we apply the changes to?

Investo	r num	ber					
Product	: wrap	per r	nam	е			
Wrappe	er num	ber					
Forenar	ne(s)						
· · · · · ·							

Sur	nam	ie					

Address as currently recorded with us

Postcode





2. Bank details for payments out or income

Please provide details of the bank/building society current account the income or payment is to be paid into. If you're making a payment to a third party, we'll need a certified copy of a bank statement for the third party account before payment can be made.

If the change(s) you're making affect your existing Direct Debit instructions and you've a regular investment in place, please complete a Direct Debit instruction for each of your products.

Name of bank/building society	Account name
Address	Branch sort code
	Account number
Postcode	Building society reference number

3. Regular investments

You should complete this section if you want to cancel or change a regular investment being made to your existing investment choice. If you want to start regular investments you should complete a new investment application for the appropriate product. The regular investment instructions on this application will replace any previous instruction.

Investor regular investment	Third party regular investment (pension plan only)
Cancel my existing investor regular investment or	Cancel my existing investor regular investment
Change my existing investor regular investment	or
£ (net*)	Change my existing investor regular investment
All regular investments will be paid monthly. or for ISA only	£ (net*)
Maximum allowed for remainder of this tax year	All regular investments will be paid monthly.
Do you want to increase your regular payments each year? Please select one option.	Do you want to increase your regular payments each year? Please select one option
No	No
Yes - by the Retail Price Index (RPI)	Yes - by the Retail Price Index (RPI)
Employer regular investment (pension plan only) Please make sure that your employer completes a Record of payments due form for any changes to an individual SIPP.	* For the pension plan, we'll reclaim the basic tax rate on this amount, which will be invested in accordance with the Aegon Terms and Conditions.

Cancel my existing investor regular investment

4. Regular withdrawals

You should complete this section if you'd like to start regular withdrawals or change an existing regular withdrawal instruction. Withdrawals from the pension plan must be made using the Benefits crystallisation event form.



Your withdrawal will be paid out of your product on the day selected and will take approximately three additional business days to clear into your chosen account.

5. Change of adviser charge

This instruction will replace your existing instruction for this product. This can be a monetary amount or a percentage based on the value of the top up contribution. The percentage is based on the value of your product wrapper.



* To be agreed by you and your adviser

6. Customer declaration

To the best of my knowledge and belief the information I've supplied in this form is true and complete.

You should sign and date this form by typing your full name in the signature box below and typing the date in the date boxes or by using any other electronic signature method we have agreed, in writing with your adviser, to accept. Your typed name or agreed electronic signature method in the signature box will be your signature. When you sign the form, by typing your name in this box or using the agreed electronic signature method, you are making the declarations and confirming that you wish to proceed with the instructions in this form.

Date		Date
Print name		Print name
Signature (type name here)		Signature (type name here)
X	X	x x
If you have a joint plan (only available for Aegon Retirement Choices GIA investors) please provide signatures of all investors.		Date
Date		Print name
Print name		Signature (type name here)
		x x
Signature (type name here)		
x	X	

7. Adviser declaration

Where you have completed this form on behalf of the customer named in section 1, when you sign the form, by typing your name in this box or using another electronic signature method we have previously agreed in writing with you that you may use, you are making the declarations and confirming that the customer wishes to proceed with the instructions in this form. By signing this form, by typing your name in the box below or using such other agreed electronic signature method, you make the following additional declarations:

- You declare that: 7.1
 - to the best of your knowledge and belief, the information supplied to Aegon on behalf of the customer is true and complete;
 - you have the appropriate authority from the customer to complete this form, to make the declarations in this form on their behalf and to provide Aegon with the instructions set out in this form, acknowledging that Aegon reserves the right to request a copy of the authority and failure to provide a copy when requested may result in Aegon being unable to proceed with the instructions; and
 - you have discussed the form with the customer and they are aware of its content, they agree to the declarations and agree to you submitting this application on their behalf.

7.2 You hereby indemnify Aegon against all claims, losses, tax charges, penalties and interest incurred or due to be paid by Aegon as a result of your failure to obtain the appropriate authority from the customer and/or supplying incorrect or inaccurate information and Aegon relying on and following the instructions given in this application form.



Signature (type name here)

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